STATE OF ALABAMA

eSTART

Leave Course Guide for Managers

August 2015

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

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Core Leave Concepts

Importance

Purpose

It is important that you consistently and accurately administer State of Alabama’s leave policy rules. To make this happen, you need to manage employees’ paid and unpaid leave time in an efficient and timely manner. The Leave application supports your ability to perform leave management tasks as you open and maintain leave cases, send leave documents, and allocate and track the amount of leave an employee takes.

eSTART Leave:

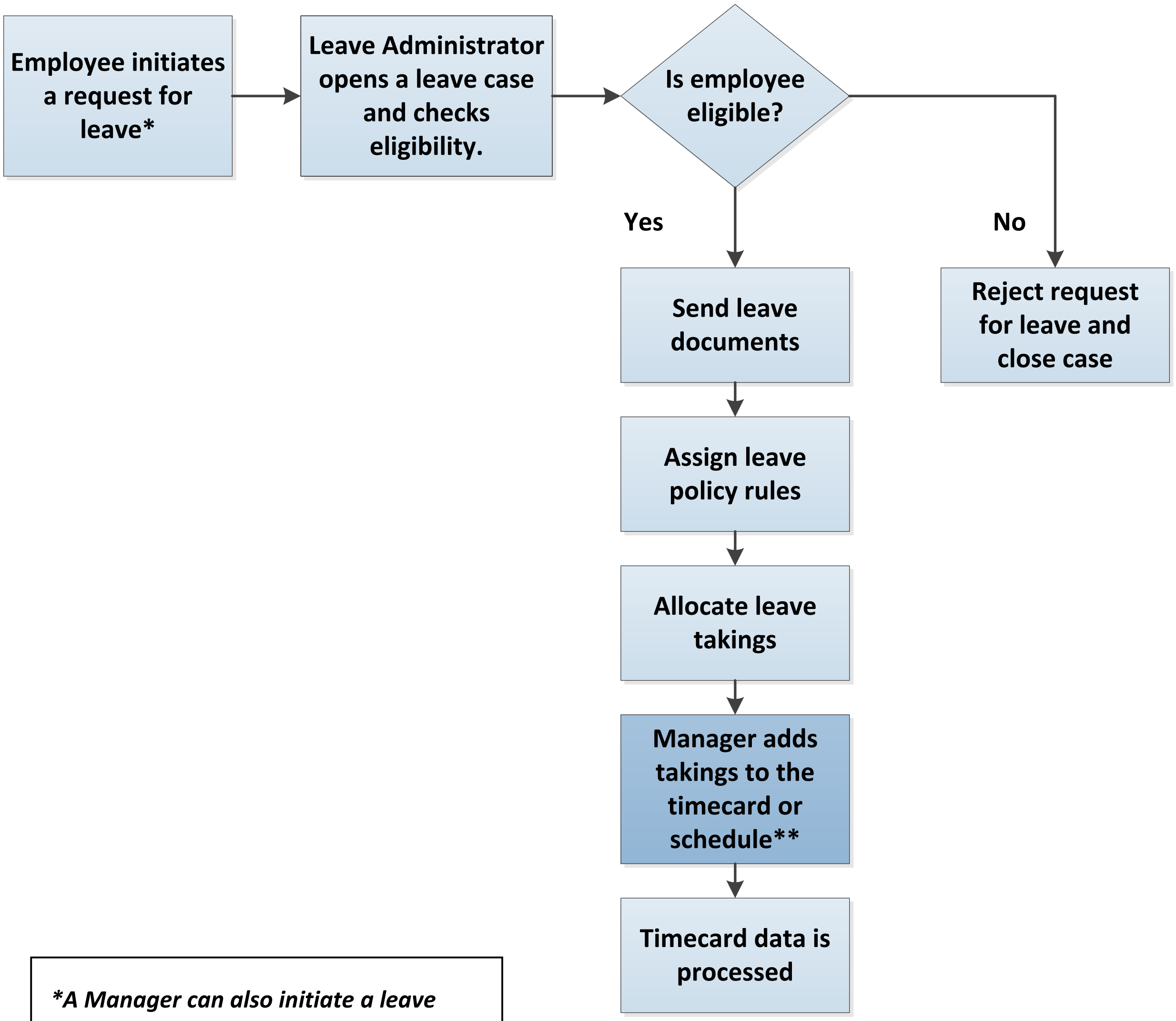
- Automates the process of administering leave policies.
- Helps State of Alabama achieve compliance with required federal, state, and local mandates.

The Leave Process

Purpose

The Leave process automates the administering and tracking of paid and unpaid leave policies. Managers can easily track both continuous and intermittent leave, and add leave time against an employee's open leave case. In addition to centralizing administration of leave policies throughout State of Alabama, employees benefit from the consistent application of leave policies to individual leave cases.

The following illustration shows the high-level process for administering leave cases.


Employee initiates a request for leave*
Leave Administrator opens a leave case and checks eligibility.
Is employee eligible?
Yes
No
Send leave documents
Assign leave policy rules
Allocate leave takings
Manager adds takings to the timecard or schedule**
Timecard data is processed
Reject request for leave and close case

A Manager can also initiate a leave request on behalf of the employee.

*****The Manager may commit leave to the timecard. An employee may submit a time off request for an open and approved case.***

Roles and Responsibilities

Purpose

Each employee and manager has responsibilities that are important in the leave process. Each person's role determines his or her responsibilities, and the tasks that he or she performs in the application.

Common Employee Tasks

- Submit new leave case requests.
- Request time off for an open and approved leave case.
- Provide required leave documentation.
- Submit requests for additional leave, as needed.

Common Manager Tasks

On a daily or as needed basis, department managers perform the following tasks:

- Monitor leave events through leave views.
- Enter hours for employees' leave cases.

On a pay period or as-needed basis, managers perform the following task:

- Run leave reports.

Common Leave Administrator Tasks

On a pay-period or as-needed basis, typical Leave Administrator tasks include:

- Determine eligibility and open leave cases.
- Administer open leave cases, including documentation.
- Enter hours for employees' continuous leave cases.
- Run leave reports.

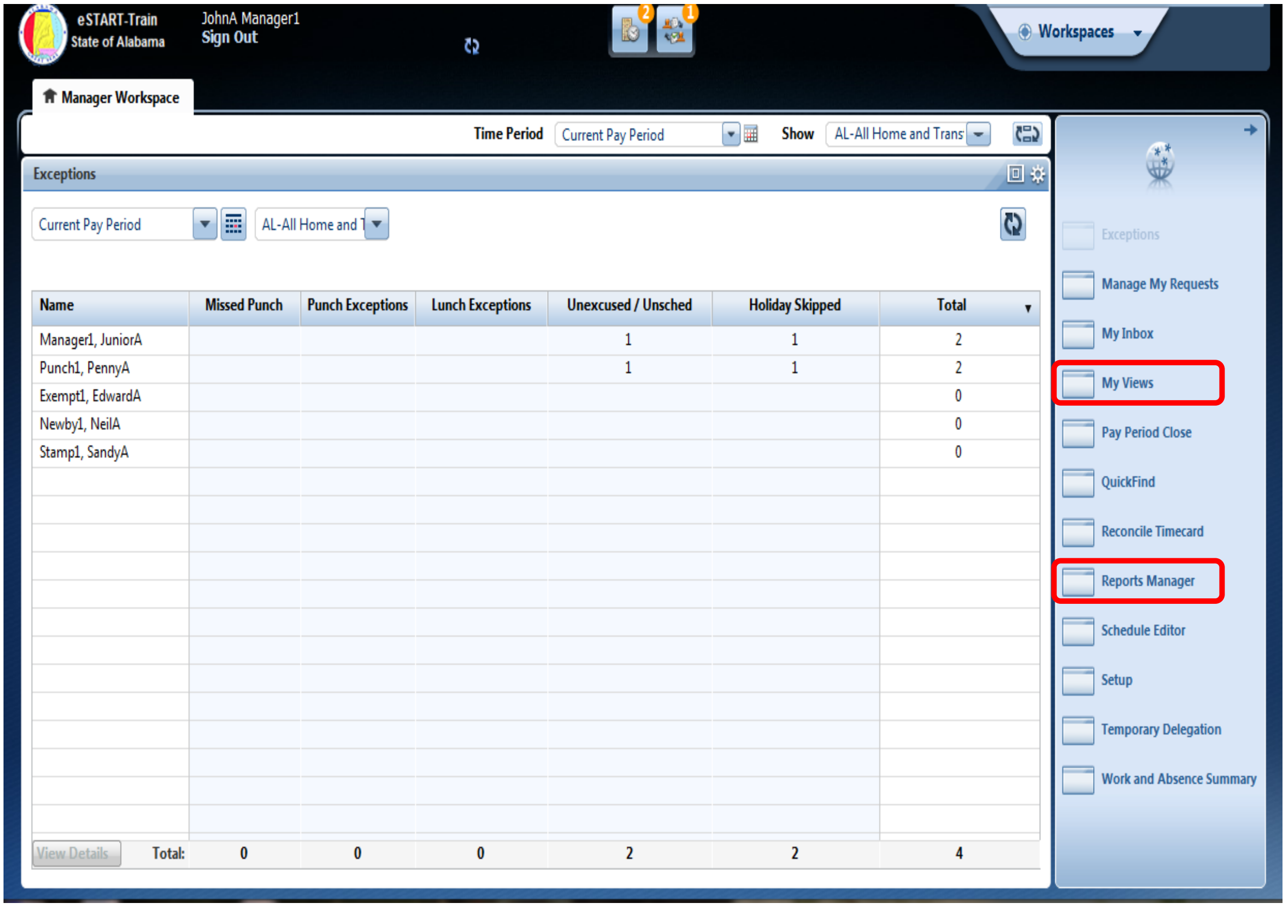
Managing Leave

Exploring Leave Tools in eSTART

Purpose

The navigator is your starting point for creating and maintaining your employees’ time and leave information. There are two key tools available in the Related Items pane that help you to perform common leave tasks, such as entering your employees’ leave takings and monitoring leave cases.

Key Leave Tools


eSTART-Train
State of Alabama
JohnA Manager1
Sign Out
Workspaces
Manager Workspace
Exceptions
View Details
Exceptions
Manage My Requests
My Inbox
My Views
Pay Period Close
QuickFind
Reconcile Timecard
Reports Manager
Schedule Editor
Setup
Temporary Delegation
Work and Absence Summary

Time Period: Current Pay Period
Show: AL-All Home and Trans

Name	Missed Punch	Punch Exceptions	Lunch Exceptions	Unexcused / Unsched	Holiday Skipped	Total
Manager1, JuniorA				1	1	2
Punch1, PennyA				1	1	2
Exempt1, EdwardA						0
Newby1, NeilA						0
Stamp1, SandyA						0
Total:	0	0	0	2	2	4

Navigator area	Description
My Views	Access the My Views workspace in eSTART to view Leave Hours View and Leave Cases View. You can also use this workspace to access employee timecards for purposes of entering leave time for an employee.
Reports Manager	Access the Reports Manager workspace in eSTART to run and view leave reports, such as the Leave Hours Detail and Leave Hours Summary reports.

Accessing Leave Views

Purpose

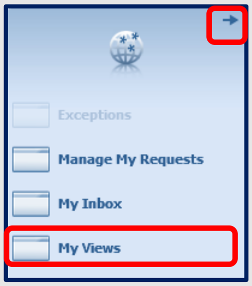
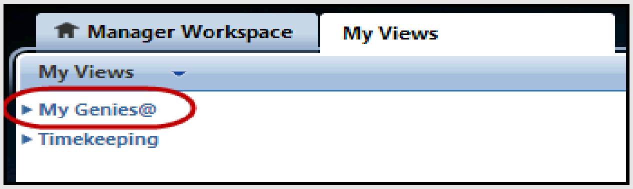
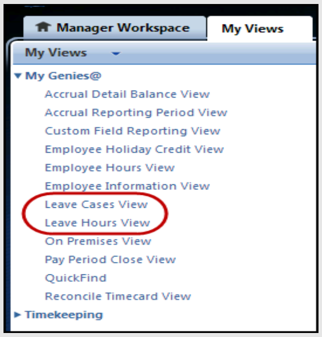
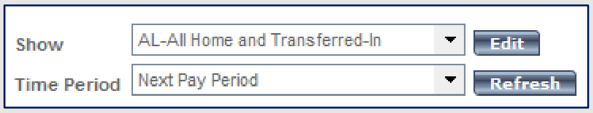
eSTART includes the following leave Views:

- Leave Cases View
- Leave Hours View

Either of these Views may be used as a starting point for viewing and monitoring employee leave cases. Leave Views are accessed from the same workspace that timekeeper views are accessed.

Exercise

You want to access the **Leave Views**.

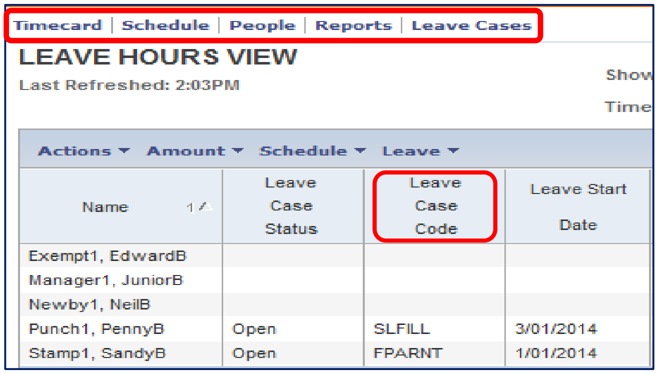
Steps		
1	In the **Related Items** pane, click the **arrow** to expand the pane, and select **My Views**.	 Exceptions Manage My Requests My Inbox My Views
2	Click the arrow next to **My Genies** to expand the category.	 Manager Workspace My Views My Views My Genies@ Timekeeping
3	Select **Leave Hours View.**	 Manager Workspace My Views My Views My Genies@ Accrual Detail Balance View Accrual Reporting Period View Custom Field Reporting View Employee Holiday Credit View Employee Hours View Employee Information View Leave Cases View Leave Hours View On Premises View Pay Period Close View QuickFind Reconcile Timecard View Timekeeping
4	Select **AL-All Home and Transferred-In** from the **Show** drop-down. Select **Next Pay Period** selected in the **Time Period** drop-down.	Show AL-All Home and Transferred-In Time Period Next Pay Period Edit Refresh

Using the Tools in Leave Views

Quick links are located at the top of the View, and let you quickly access editors and tools that display information specific to one or more employees. For example, select an employee and click the Timecard quick link to access his or her timecard for purposes of adding leave time; or select multiple employees and click the Reports quick link to generate a report for only those selected employees.

The **Leave** drop-down, located on the Action Bar, is also available and will be used to view or add new leave cases.

Note: These tools are common to both the Leave Hours View and the Leave Cases View.


Timecard | Schedule | People | Reports | Leave Cases
Show
Time
Actions ▾ Amount ▾ Schedule ▾ Leave ▾

LEAVE HOURS VIEW

Last Refreshed: 2:03PM

Name	Leave Case Status	Leave Case Code	Leave Start Date
Exempt1, EdwardB			
Manager1, JuniorB			
Newby1, NeilB			
Punch1, PennyB	Open	SLFILL	3/01/2014
Stamp1, SandyB	Open	FPARNT	1/01/2014

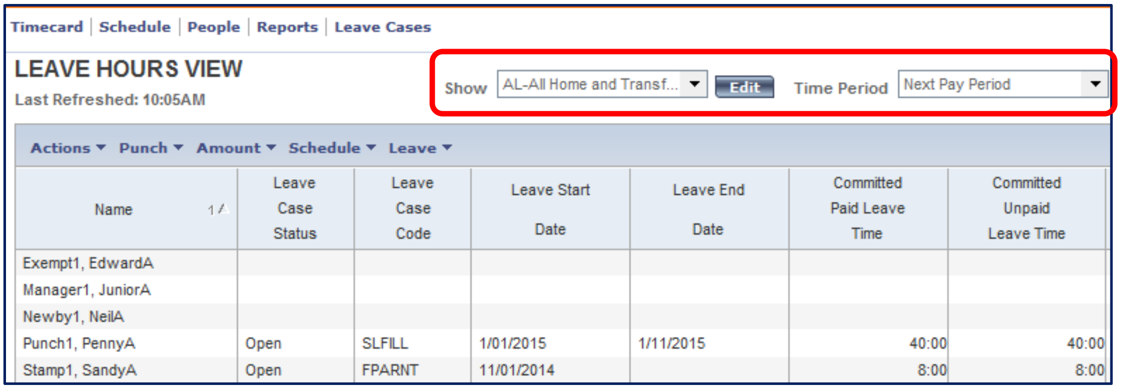
Tip

There are various ways to select employees:

- Use the **Ctrl** key to select more than one employee not listed next to each other.
- Use the **Shift** key to select all employees listed between two employees.
- Click and drag the mouse to select employees.
- Choose **Actions>Select All** to select all employees.

The **Show** drop-down lets you select and display a specific group of employees. The default setting for the Show field when you log on is **All Home and Transferred In**, which displays all employees that report to you. You can use the Show field to further refine your selection.

The **Time Period** field lets you define the desired timeframe. The default setting for the Time Period field is **Current Pay Period**. You can select a predefined date period option, such as Previous Pay Period or, you can define a specific date or range of dates.


Timecard | Schedule | People | Reports | Leave Cases
Edit
Actions ▾ Punch ▾ Amount ▾ Schedule ▾ Leave ▾

LEAVE HOURS VIEW

Last Refreshed: 10:05AM

Show AL-All Home and Transf...

Time Period Next Pay Period

Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time
Exempt1, EdwardA						
Manager1, JuniorA						
Newby1, NeilA						
Punch1, PennyA	Open	SLFILL	1/01/2015	1/11/2015	40:00	40:00
Stamp1, SandyA	Open	FPARNT	11/01/2014		8:00	8:00

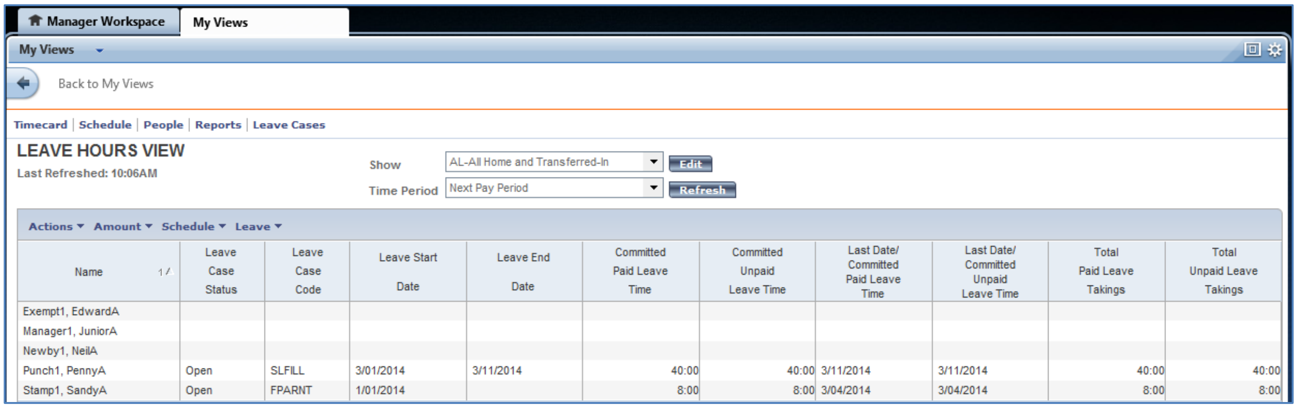
Exploring the Leave Hours View

Purpose

The Leave Hours View is especially useful for viewing total leave hours. It also provides other information about each leave case in eSTART, including:

- Leave Case Status
- Last date of committed paid and unpaid leave time
- Leave end date (if one is provided)

Key Information in the Leave Hours View


Manager Workspace
My Views
My Views
Back to My Views
Timecard | Schedule | People | Reports | Leave Cases
Edit
Refresh
Actions ▾ Amount ▾ Schedule ▾ Leave ▾

LEAVE HOURS VIEW

Last Refreshed: 10:06AM

Show: AL-All Home and Transferred-In

Time Period: Next Pay Period

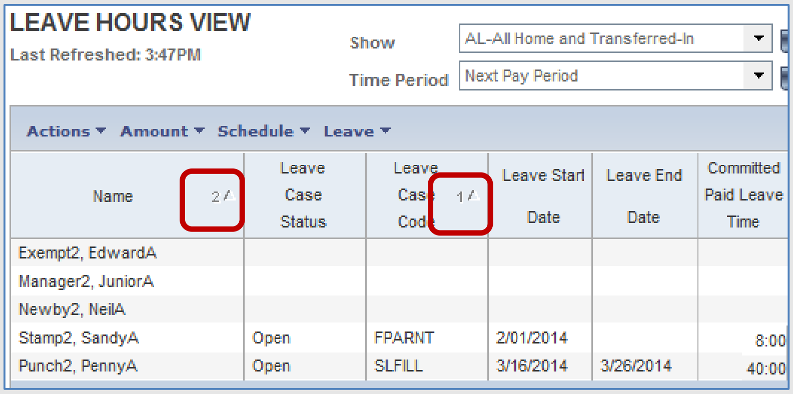
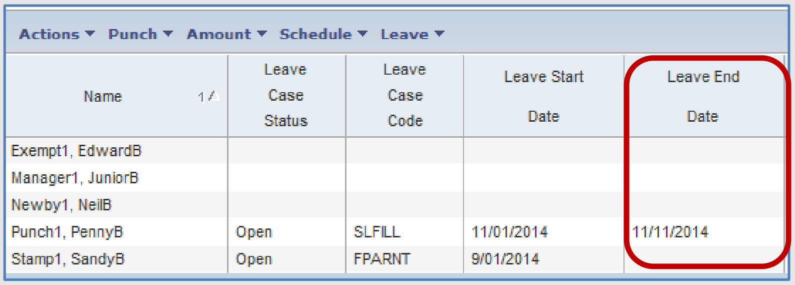
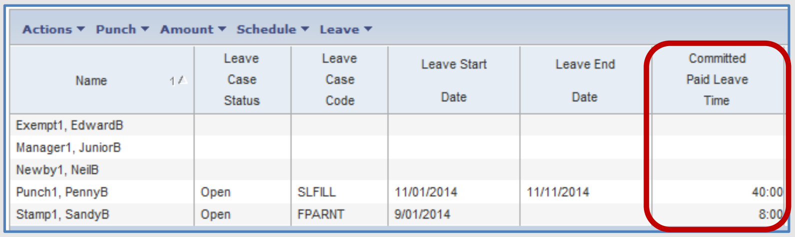
Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	3/01/2014	3/11/2014	40:00	40:00	3/11/2014	3/11/2014	40:00	40:00
Stamp1, SandyA	Open	FPARNT	1/01/2014		8:00	8:00	3/04/2014	3/04/2014	8:00	8:00

Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period, such as Open, Closed, Pending, Submitted, or Retracted.
Leave Case Code	Type of leave, such as Self or Family.
Leave Start Date	This is the first day that the employee takes leave.
Leave End Date	This is the employee’s expected return date.
Committed Paid/ Unpaid Leave Time	The Committed Paid Leave Time and Committed Unpaid Leave Time columns show the amount of paid and unpaid time that has been committed to the schedule or timecard in the selected time period.
Last Date/Committed Paid/Unpaid Leave Time	The Last Date/Committed Paid Leave Time and Last Date/Committed Unpaid Leave Time columns show the date of the last committed paid and unpaid amounts.
Total Paid/Unpaid Leave Takings	The Total Paid Leave Takings and Total Unpaid Leave Takings columns show the total amount of paid and unpaid leave that an employee has taken.

Exercise

You want to know when employee **Penny Punch** will return from maternity leave and how much leave time has been committed to **Sandy Stamp's** timecard. Select **Next Pay Period.**

The **Leave Hours View** was selected above. Remain on this page.

Steps		
1	**Note:** Click two column headers to sort the data. - A down arrow shows the sort as descending; an up arrow shows the sort as ascending. A number displays in each column heading next to the up or down arrow to identify the primary sorting column.	
2	Find **Penny Punch** and view her **Leave End Date** column.	
3	Find **Sandy Stamp** and view her **Committed Paid Leave Time** column.	

LEAVE HOURS VIEW

Last Refreshed: 3:47PM

Show: AL-All Home and Transferred-In

Time Period: Next Pay Period

Name 2	Leave Case Status	Leave Case Code 1	Leave Start Date	Leave End Date	Committed Paid Leave Time
Exempt2, EdwardA					
Manager2, JuniorA					
Newby2, NeilA					
Stamp2, SandyA	Open	FPARNT	2/01/2014		8:00
Punch2, PennyA	Open	SLFILL	3/16/2014	3/26/2014	40:00

Name 1	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date
Exempt1, EdwardB				
Manager1, JuniorB				
Newby1, NeilB				
Punch1, PennyB	Open	SLFILL	11/01/2014	11/11/2014
Stamp1, SandyB	Open	FPARNT	9/01/2014	

Name 1	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time
Exempt1, EdwardB					
Manager1, JuniorB					
Newby1, NeilB					
Punch1, PennyB	Open	SLFILL	11/01/2014	11/11/2014	40:00
Stamp1, SandyB	Open	FPARNT	9/01/2014		8:00

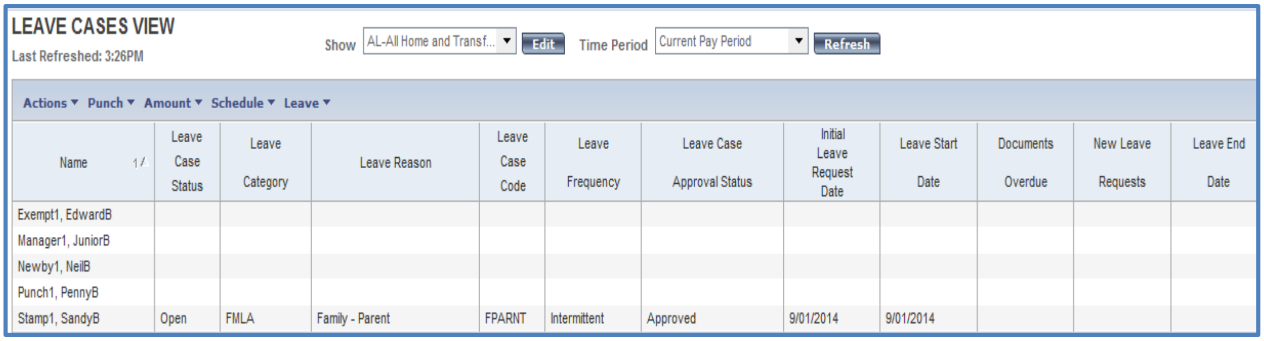
Exploring the Leave Cases View

Purpose

The Leave Cases View is especially useful for viewing leave reasons and leave frequencies. It also provides other information about each leave case in eSTART including:

- Leave case status
- Leave category
- Initial leave request date

Key Information in the Leave Cases View



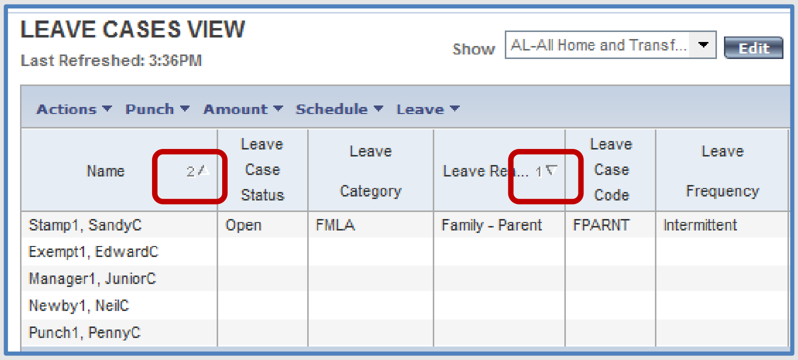
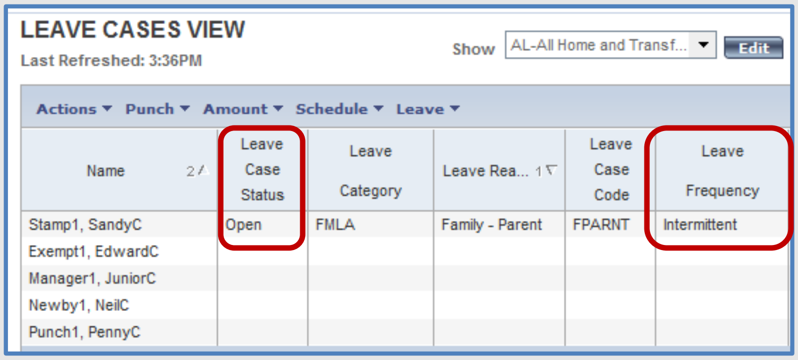
Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
Exempt1, EdwardB											
Manager1, JuniorB											
Newby1, NeilB											
Punch1, PennyB											
Stamp1, SandyB	Open	FMLA	Family - Parent	FPARNT	Intermittent	Approved	9/01/2014	9/01/2014			

Column	Description
Leave Case Status	Status of a leave case, such as Open, Closed, or Submitted.
Leave Category	Type of leave, such as Self or Family.
Leave Reason	Indicates a more specific leave such as serious illness or birth.
Leave Case Code	Type of leave, such as Self or Family.
Leave Frequency	Indicates whether the employee is on continuous or intermittent leave.
Leave Case Approval Status	Indicates whether a leave request is approved, pending or denied.
Initial Leave Request Date	Date the leave request was made.
Leave Start Date	Date leave starts for an employee.
Documents Overdue	A check in this column indicates that a document is overdue.
New Leave Requests	A check in this column indicates additional time requested on an existing leave case.
Leave End Date	The expected date on which an employee returns to work.

Exercise

You want to review the **status** and **frequency** of **Sandy Stamp's** leave case. Access the **Leave Cases View** to review Sandy's leave information in the **Current Pay period**.

The **Leave Cases View** was selected above. Remain on this page.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr>
<td>1</td>
<td>Note: Click two column headers to sort the data.
A down arrow shows the sort as descending; an up arrow shows the sort as ascending.
A number displays in each column heading next to the up or down arrow to identify primary sorting column.</td>
<td>
LEAVE CASES VIEW
Last Refreshed: 3:36PM
Show
AL-All Home and Transf...
Edit
Actions
Punch
Amount
Schedule
Leave
<table>
<tr><th>Name 2</th><th>Leave Case Status</th><th>Leave Category</th><th>Leave Rea... 1</th><th>Leave Case Code</th><th>Leave Frequency</th></tr>
<tr><td>Stamp1, SandyC</td><td>Open</td><td>FMLA</td><td>Family - Parent</td><td>FPARNT</td><td>Intermittent</td></tr>
<tr><td>Exempt1, EdwardC</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Manager1, JuniorC</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Newby1, NeilC</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyC</td><td></td><td></td><td></td><td></td><td></td></tr>
</table></td>
</tr>
<tr>
<td>2</td>
<td>Review the status and frequency information for Sandy Stamp.</td>
<td>
LEAVE CASES VIEW
Last Refreshed: 3:36PM
Show
AL-All Home and Transf...
Edit
Actions
Punch
Amount
Schedule
Leave
<table>
<tr><th>Name 2</th><th>Leave Case Status</th><th>Leave Category</th><th>Leave Rea... 1</th><th>Leave Case Code</th><th>Leave Frequency</th></tr>
<tr><td>Stamp1, SandyC</td><td>Open</td><td>FMLA</td><td>Family - Parent</td><td>FPARNT</td><td>Intermittent</td></tr>
<tr><td>Exempt1, EdwardC</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Manager1, JuniorC</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Newby1, NeilC</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyC</td><td></td><td></td><td></td><td></td><td></td></tr>
</table></td>
</tr>
</table>

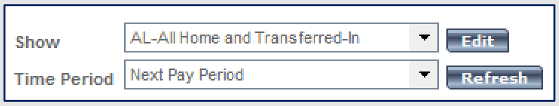
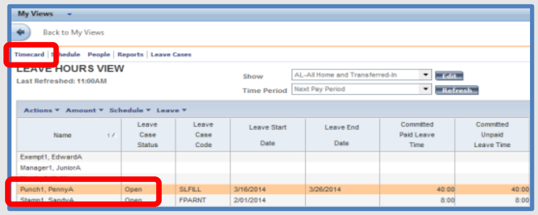
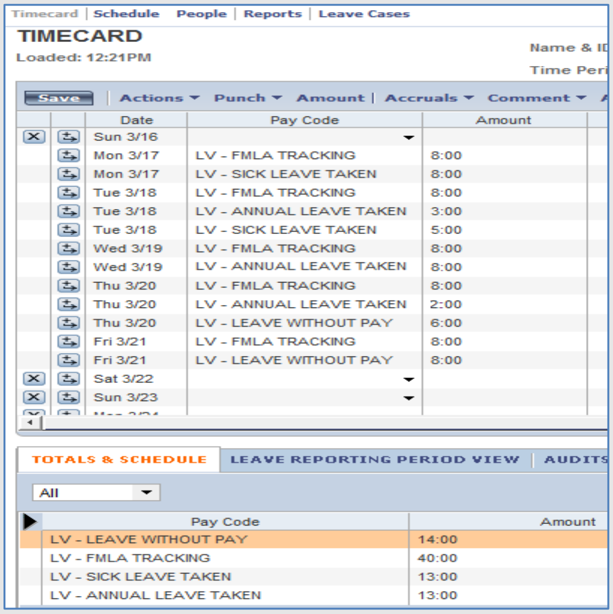
Reviewing Leave Time in a Timecard

Purpose

After leave has been approved and committed for an employee by your Leave Administrator, you can view those leave hours in your employee's timecard. Leave time displays differently than other pay codes in the timecard. Leave time displays in black text with the prefix "LV" and is not editable.

Exercise

Penny Punch is out on leave. You want to review her timecard to confirm that the leave hours are accurate. The **Leave Cases View** was selected in the previous exercise. Remain on this page.

Steps		
1	Select **AL-All Home and Transferred-In** from the **Show** drop-down. Select **Next Pay Period** selected in the **Time Period** drop-down.	 Show: AL-All Home and Transferred-In Time Period: Next Pay Period Edit Refresh
2	Select **Penny Punch** then click the **Timecard** link.	
3	Review the leave takings in the timecard for the selected time period. **LV – Tracking** always displays as an entry on the timecard for tracking purposes. The secondary entry(s) describe the type of leave used. **Totals and Schedule** provides a summary for the time period selected. **Note:** FMLA cases use leave in a certain order, based on the type of case. See the **Extended Leave Cascade** job aid for this information.	

Step 2 screenshot:

My Views
Back to My Views
Timecard | Schedule | People | Reports | Leave Cases
Actions Amount Schedule Leave
Edit
Refresh

LEAVE HOURS VIEW
Last Refreshed: 11:00AM

Show: AL-All Home and Transferred-In
Time Period: Next Pay Period

Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time
Exempt1, EdwardA						
Manager1, JuniorA						
Punch1, PennyA	Open	SLFILL	3/16/2014	3/26/2014	40:00	40:00
Stamp1, SandyA	Open	FPARNT	2/01/2014		8:00	8:00

Step 3 screenshot:

Timecard | Schedule | People | Reports | Leave Cases
Save
Actions
Punch
Amount
Accruals
Comment
TOTALS & SCHEDULE
LEAVE REPORTING PERIOD VIEW

TIMECARD
Loaded: 12:21PM

Date	Pay Code	Amount
Sun 3/16		
Mon 3/17	LV - FMLA TRACKING	8:00
Mon 3/17	LV - SICK LEAVE TAKEN	8:00
Tue 3/18	LV - FMLA TRACKING	8:00
Tue 3/18	LV - ANNUAL LEAVE TAKEN	3:00
Tue 3/18	LV - SICK LEAVE TAKEN	5:00
Wed 3/19	LV - FMLA TRACKING	8:00
Wed 3/19	LV - ANNUAL LEAVE TAKEN	8:00
Thu 3/20	LV - FMLA TRACKING	8:00
Thu 3/20	LV - ANNUAL LEAVE TAKEN	2:00
Thu 3/20	LV - LEAVE WITHOUT PAY	6:00
Fri 3/21	LV - FMLA TRACKING	8:00
Fri 3/21	LV - LEAVE WITHOUT PAY	8:00
Sat 3/22		
Sun 3/23		

All

Pay Code	Amount
LV - LEAVE WITHOUT PAY	14:00
LV - FMLA TRACKING	40:00
LV - SICK LEAVE TAKEN	13:00
LV - ANNUAL LEAVE TAKEN	13:00

Note

Contact your Leave Administrator to discuss necessary leave modifications to an employee's leave hours.

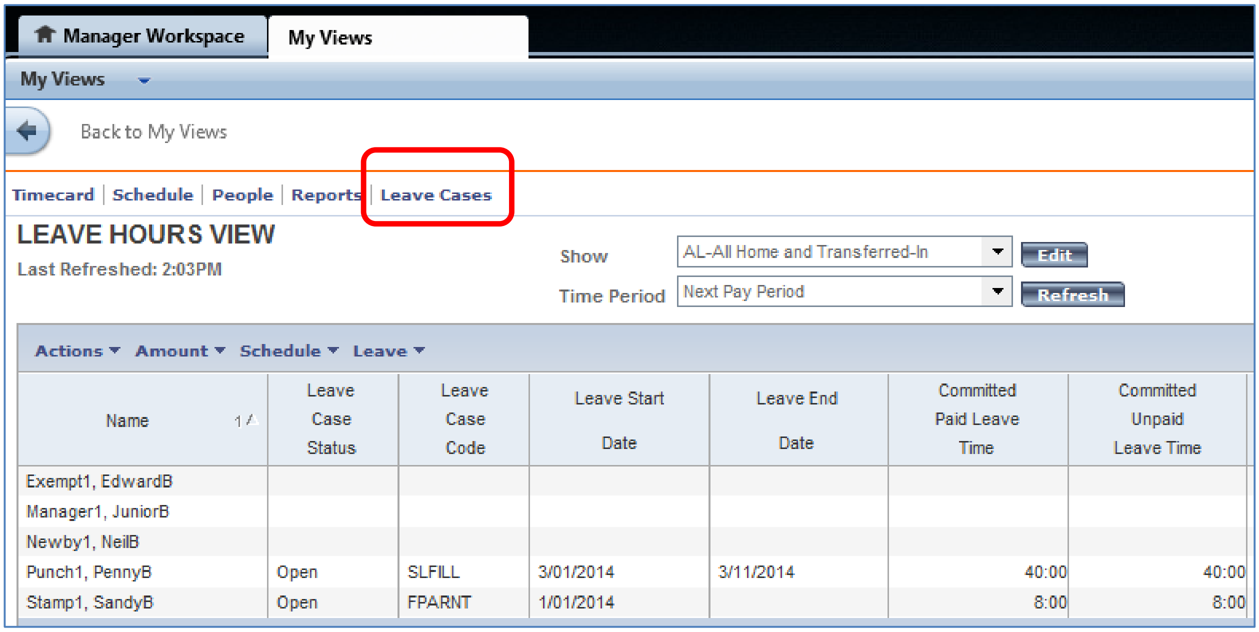
Requesting Leave for an Employee

Purpose

Occasionally, it is necessary to initiate a leave request for an employee who is unable to do so, for example, when an employee is already on sick leave.

The Leave Case Editor is a tool in both Leave Views that allows you to electronically complete a request for leave on the employee's behalf. Once you submit the leave request, it is electronically sent to the Leave Administrator who will check the employee's eligibility and process the proper documentation.

The Leave Case Editor can be accessed through a Quick Link in either the Leave Hours View or the Leave Cases View as illustrated below.


Manager Workspace
My Views
My Views
Back to My Views
Timecard | Schedule | People | Reports | Leave Cases
Edit
Refresh
Actions ▾ Amount ▾ Schedule ▾ Leave ▾

LEAVE HOURS VIEW

Last Refreshed: 2:03PM

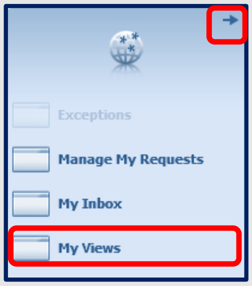
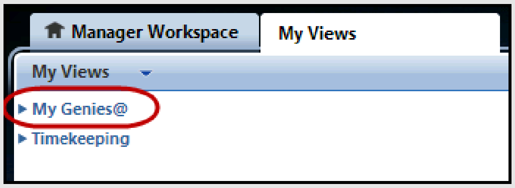
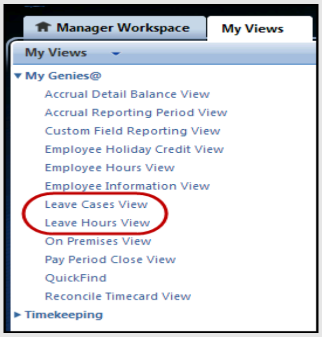
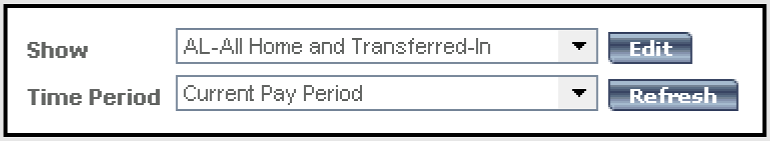
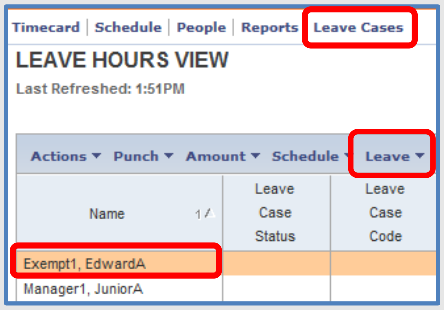
Show: AL-All Home and Transferred-In

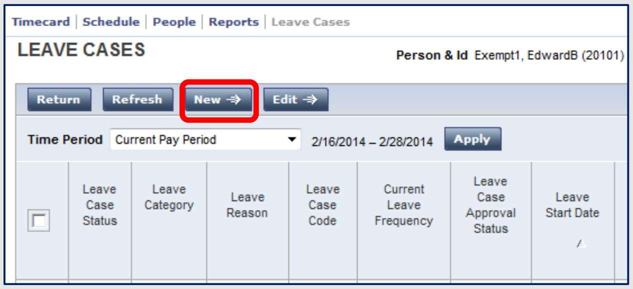
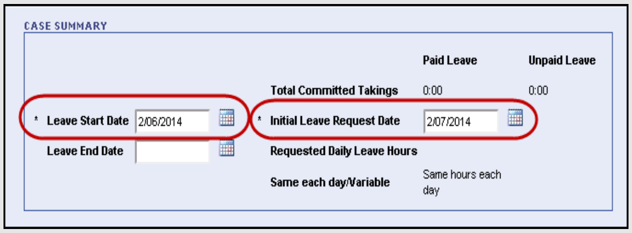
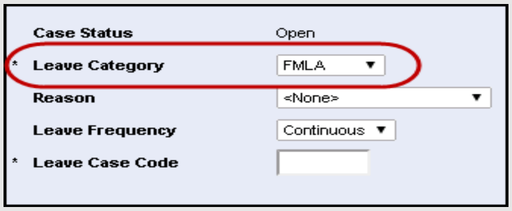
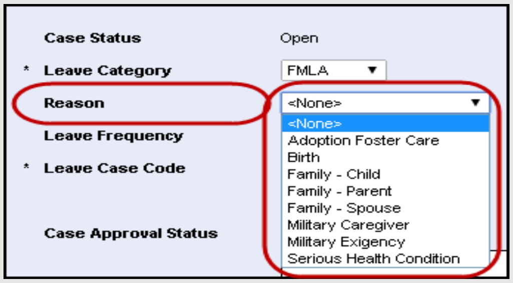
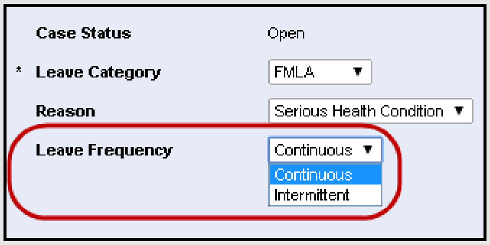
Time Period: Next Pay Period

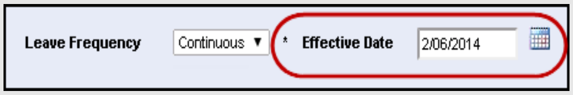
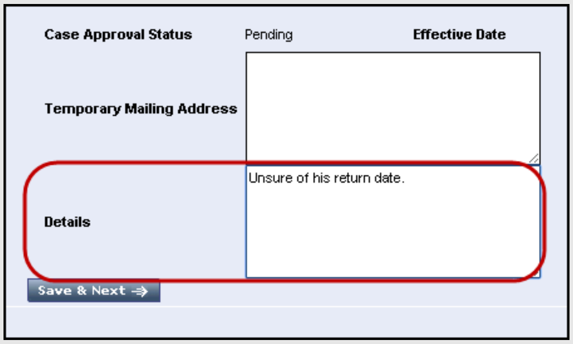
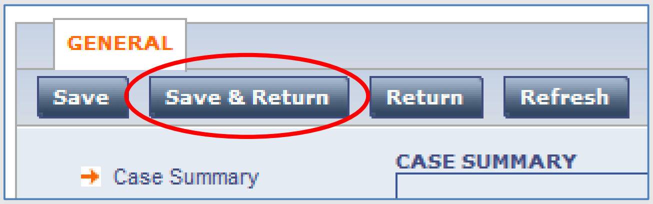
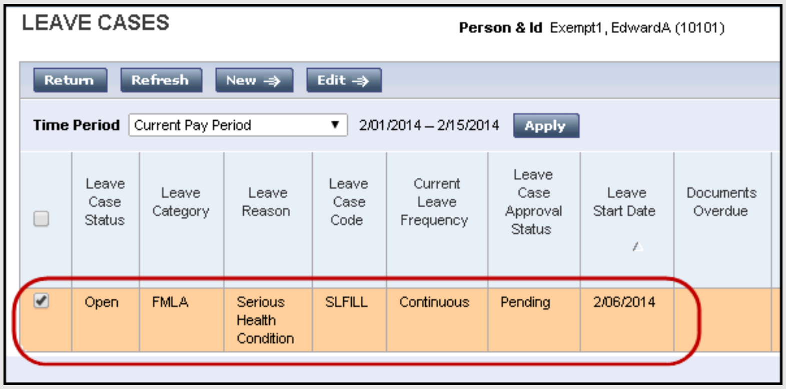
Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time
Exempt1, EdwardB						
Manager1, JuniorB						
Newby1, NeilB						
Punch1, PennyB	Open	SLFILL	3/01/2014	3/11/2014	40:00	40:00
Stamp1, SandyB	Open	FPARNT	1/01/2014		8:00	8:00

Exercise

Yesterday, employee, **Edward Exempt**, called to tell you that he will be unable to come to work due to an injury he sustained while working in his yard. He is unable to work and does not know when he will return. Edward has asked you to initiate a leave of absence request. You want to access **Edward Exempt's** record and **initiate a leave request** on his behalf.

Steps		
1	In the **Related Items** pane, click the **arrow** to expand the pane, and select **My Views**.	 Exceptions Manage My Requests My Inbox My Views
2	Click the arrow next to **My Genies** to expand the category.	 Manager Workspace My Views My Views My Genies@ Timekeeping
3	Select either **Leave Cases View** or **Leave Hours View**.	 Manager Workspace My Views My Views My Genies@ Accrual Detail Balance View Accrual Reporting Period View Custom Field Reporting View Employee Holiday Credit View Employee Hours View Employee Information View Leave Cases View Leave Hours View On Premises View Pay Period Close View QuickFind Reconcile Timecard View Timekeeping
4	From the **Show** drop-down list, select **All Home and Transferred-In**.	Show AL-All Home and Transferred-In Time Period Current Pay Period Edit Refresh
5	From the **Time Period** drop-down list, select **Current Pay Period**.	
6	Select **Edward Exempt** and then click **Leave Cases**. **Note:** You may also select the **Leave** drop-down. Then select **New Leave Case**.	 Timecard | Schedule | People | Reports | Leave Cases LEAVE HOURS VIEW Last Refreshed: 1:51PM Actions Punch Amount Schedule Leave Name Leave Case Status Leave Case Code Exempt1, EdwardA Manager1, JuniorA

Steps		
7	From the **Leave Cases** workspace, click **New**.	 LEAVE CASES Person & Id Exempt1, EdwardB (20101) Time Period Current Pay Period 2/16/2014 – 2/28/2014 Timecard | Schedule | People | Reports | Leave Cases Return Refresh New Edit Apply Leave Case Status Leave Category Leave Reason Leave Case Code Current Leave Frequency Leave Case Approval Status Leave Start Date
8	In the **Leave Start Date** field, enter the date the employee will begin the leave or select a date using the calendar icon. For this exercise, **today's date** is the default. Leave this date selected.	 CASE SUMMARY Paid Leave Unpaid Leave Total Committed Takings 0:00 0:00 * Leave Start Date 2/06/2014 * Initial Leave Request Date 2/07/2014 Leave End Date Requested Daily Leave Hours Same each day/Variable Same hours each day
9	In the **Initial Leave Request Date**, enter the date the employee requested leave or select a date using the calendar icon. For this exercise, **today's date** is the default. Leave this date selected.	
10	In the **Leave Category** field, accept the default value of **FMLA**.	 Case Status Open * Leave Category FMLA Reason <None> Leave Frequency Continuous * Leave Case Code
11	From the Leave Reason drop-down list, select the appropriate leave reason. For this exercise, select Serious Health Condition. Note: After selecting a reason, the Leave Case Code is automatically populated.	 Case Status Open * Leave Category FMLA Reason <None> Leave Frequency * Leave Case Code Case Approval Status <None> Adoption Foster Care Birth Family - Child Family - Parent Family - Spouse Military Caregiver Military Exigency Serious Health Condition
12	From the Leave Frequency drop-down list, select the appropriate frequency of the employee's leave. For this exercise, select Continuous.	 Case Status Open * Leave Category FMLA Reason Serious Health Condition Leave Frequency Continuous Continuous Intermittent

Steps		
13	In the **Effective Date** field, enter the date the leave *frequency* becomes effective or select a date using the calendar icon. Leave **today's date** selected.	 **Leave Frequency** Continuous * **Effective Date** 2/06/2014
14	In the **Temporary Mailing Address** field, enter a mailing address, if necessary. **Note:** This is an optional field that may be used should the employee need to leave an alternate address.	 **Case Approval Status** Pending **Effective Date** **Temporary Mailing Address** **Details** Unsure of his return date.
15	(Optional) in the **Details** field, enter any other details that may be relevant to the leave request.	
16	Click **Save & Return** to close the leave request and return to the Leave Cases workspace.	 GENERAL Save Save & Return Return Refresh Case Summary CASE SUMMARY
17	Confirm that the leave information is correct and that the leave request was successfully submitted by reviewing the information in the **Leave Cases** workspace.	 **Person & Id** Exempt1, EdwardA (10101) **Time Period** Current Pay Period 2/01/2014 – 2/15/2014

☐	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Current Leave Frequency	Leave Case Approval Status	Leave Start Date	Documents Overdue
☑	Open	FMLA	Serious Health Condition	SLFILL	Continuous	Pending	2/06/2014	

Note

Initially the manager may not have all the information needed to open the leave case. Additional information may need to be added at a later date.

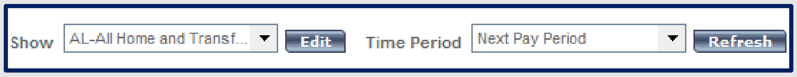
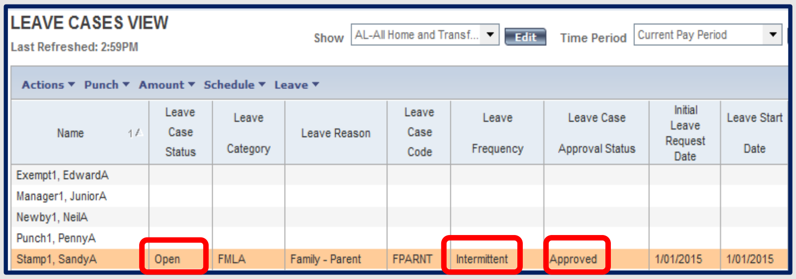
Adding Leave Time to the Timecard

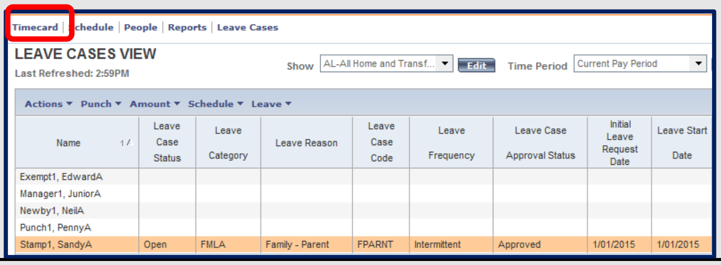
Purpose

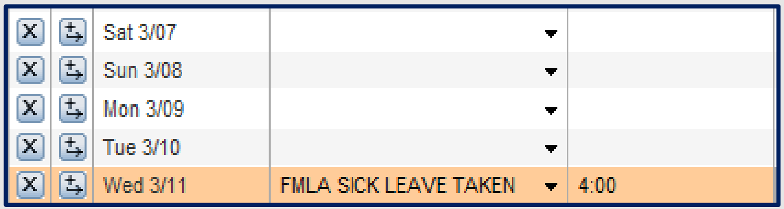
A manager has the ability to add a pay code to the timecard for an employee who has an <u>open and approved</u> FMLA or Military leave case. This must be verified BEFORE adding the pay code to the timecard of an employee. **Note:** Do not add these pay codes to an employee's timecard unless all three conditions are met.

Exercise

Sandy Stamp has an <u>open and approved</u> intermittent leave case. She requested **four hours** of leave time for **Wednesday of the current pay period** to take her mother to physical therapy. Add the **FMLA Sick Leave Taken** pay code to her timecard.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>From Related Items>My Views>My Genies, select the Leave Cases View.
Select All Home and Transferred-In from the Show drop-down.
From the Time Period drop-down list, select Current Pay Period.</td><td>
Show: AL-All Home and Transf...
Time Period: Next Pay Period
</td></tr>
<tr><td>2</td><td>From Leave Cases View, verify that Sandy has open and approved leave case.
Verify the Leave Case Code, Leave Frequency and Leave Case Approval Status columns for the car.</td><td>
LEAVE CASES VIEW
Last Refreshed: 2:59PM
Show: AL-All Home and Transf...
Time Period: Current Pay Period

<table>
<tr><th>Name</th><th>Leave Case Status</th><th>Leave Category</th><th>Leave Reason</th><th>Leave Case Code</th><th>Leave Frequency</th><th>Leave Case Approval Status</th><th>Initial Leave Request Date</th><th>Leave Start Date</th></tr>
<tr><td>Exempt1, EdwardA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Manager1, JuniorA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Newby1, NeilA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Stamp1, SandyA</td><td>Open</td><td>FMLA</td><td>Family - Parent</td><td>FPARNT</td><td>Intermittent</td><td>Approved</td><td>1/01/2015</td><td>1/01/2015</td></tr>
</table></td></tr>
<tr><td>3</td><td>Click the Timecard link from the Quick Links bar.</td><td>

LEAVE CASES VIEW
Last Refreshed: 2:59PM
Show: AL-All Home and Transf...
Time Period: Current Pay Period
<table>
<tr><th>Name</th><th>Leave Case Status</th><th>Leave Category</th><th>Leave Reason</th><th>Leave Case Code</th><th>Leave Frequency</th><th>Leave Case Approval Status</th><th>Initial Leave Request Date</th><th>Leave Start Date</th></tr>
<tr><td>Exempt1, EdwardA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Manager1, JuniorA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Newby1, NeilA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyA</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Stamp1, SandyA</td><td>Open</td><td>FMLA</td><td>Family - Parent</td><td>FPARNT</td><td>Intermittent</td><td>Approved</td><td>1/01/2015</td><td>1/01/2015</td></tr>
</table></td></tr>
<tr><td>4</td><td>From the Pay Code drop-down in the Timecard, select FMLA Sick Leave Taken.</td><td>
<table>
<tr><td>Sat 3/07</td><td></td><td></td></tr>
<tr><td>Sun 3/08</td><td></td><td></td></tr>
<tr><td>Mon 3/09</td><td></td><td></td></tr>
<tr><td>Tue 3/10</td><td></td><td></td></tr>
<tr><td>Wed 3/11</td><td>FMLA SICK LEAVE TAKEN</td><td>4:00</td></tr>
</table></td></tr>
</table>

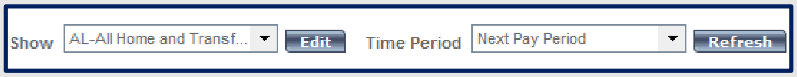
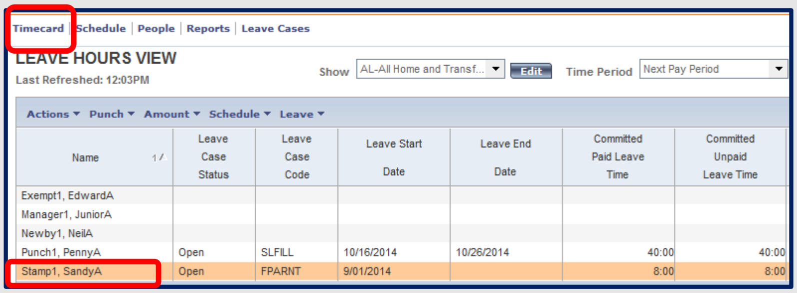
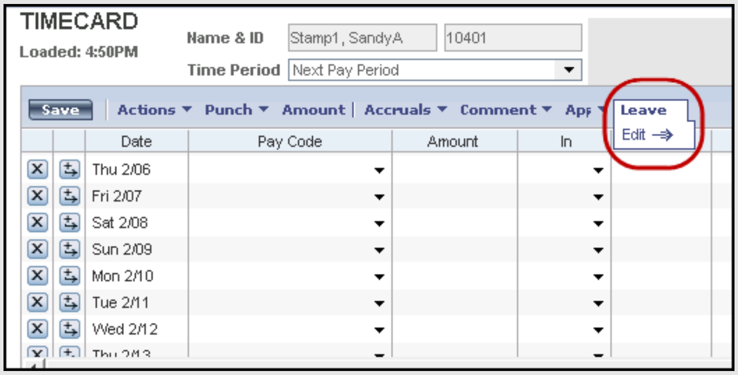
Committing Leave Time to the Timecard

Purpose

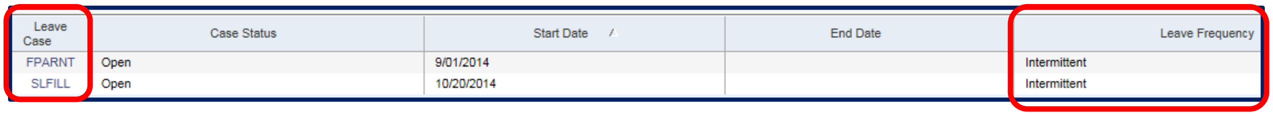
The Leave Case Editor is a tool available in the employee's timecard that allows you to enter leave time for an open leave case, especially when an employee has ongoing doctor's appointments or physical therapy. The Leave Case Editor lets you view, add, and modify leave time that was previously entered using the Leave Case Editor.

Exercise

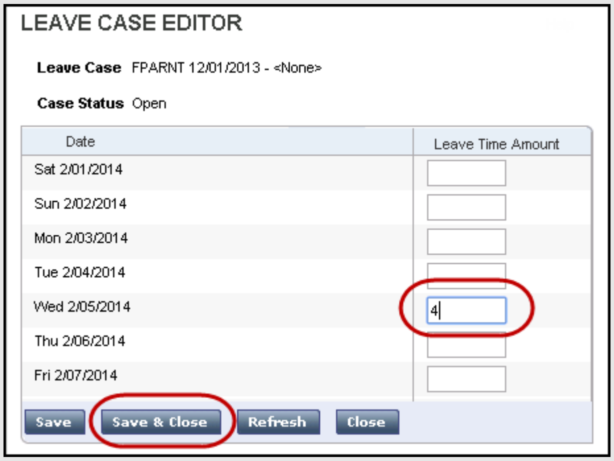
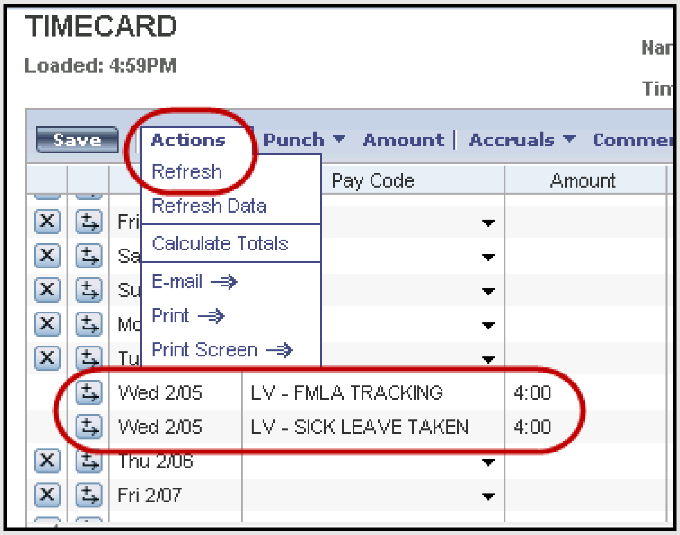
Sandy Stamp has an open and approved intermittent leave case. She requested **four hours** of leave time for **Wednesday of the next pay period** to take her mother to physical therapy. You want to use the **Leave Case Editor** to enter and commit the intermittent leave time to her timecard.

Steps		
1	From **Related Items>My Views>My Genies,** select either the **Leave Cases View** or **Leave Hours View.** Select **All Home and Transferred-In** from the **Show** drop-down. From the **Time Period** drop-down list, select **Next Pay Period**.	 Show: AL-All Home and Transf... Time Period: Next Pay Period
2	Select **Sandy Stamp** and click the **Timecard** link.	 Timecard Schedule People Reports Leave Cases LEAVE HOURS VIEW Last Refreshed: 12:03PM Show: AL-All Home and Transf... Time Period: Next Pay Period Edit Actions Punch Amount Schedule Leave Name; Leave Case Status; Leave Case Code; Leave Start Date; Leave End Date; Committed Paid Leave Time; Committed Unpaid Leave Time Exempt1, EdwardA Manager1, JuniorA Newby1, NeilA Punch1, PennyA; Open; SLFILL; 10/16/2014; 10/26/2014; 40:00; 40:00 Stamp1, SandyA; Open; FPARNT; 9/01/2014; ; 8:00; 8:00
3	Select **Leave>Edit**.	 TIMECARD Loaded: 4:50PM Name & ID: Stamp1, SandyA 10401 Time Period: Next Pay Period Save Actions Punch Amount Accruals Comment App Leave Edit Date; Pay Code; Amount; In Thu 2/06 Fri 2/07 Sat 2/08 Sun 2/09 Mon 2/10 Tue 2/11 Wed 2/12 Thu 2/13

Note: If the employee has more than one active leave case, a window will display. In the **Leave Case** column, select the applicable leave case.



Leave Case	Case Status	Start Date	End Date	Leave Frequency
FPARNT	Open	9/01/2014		Intermittent
SLFILL	Open	10/20/2014		Intermittent

Steps		
4	In the **Leave Time Amount** column, click the cell for the applicable day(s) and enter **4** leave time hours. **Note:** The Leave Time Amount must always be entered in 15-minute increments. Time for more than one day may be entered if needed.	 LEAVE CASE EDITOR **Leave Case** FPARNT 12/01/2013 - <None> **Case Status** Open Date Leave Time Amount Sat 2/01/2014 Sun 2/02/2014 Mon 2/03/2014 Tue 2/04/2014 Wed 2/05/2014 4 Thu 2/06/2014 Fri 2/07/2014
5	Click **Save & Close**.	
6	The timecard will display. Select **Actions>Refresh** and confirm that the leave time displays in the timecard. **Note:** It may be necessary to rekey the remaining time for an exempt employee.	 TIMECARD Loaded: 4:59PM Save Actions Refresh Refresh Data Calculate Totals E-mail Print Print Screen Punch Amount Accruals Pay Code Amount Wed 2/05 LV - FMLA TRACKING 4:00 Wed 2/05 LV - SICK LEAVE TAKEN 4:00 Thu 2/06 Fri 2/07

Note

Contact your Leave Administrator if you are unable to commit the time.

Also, an employee may request the time by submitting a time off request, provided he/she has an open and approved extended leave case. The available selections will vary based on the type of leave case. See the **Employee Pay Codes for Time Off Requests** job aid for a list of these pay codes.

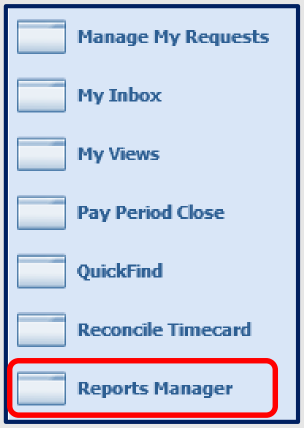
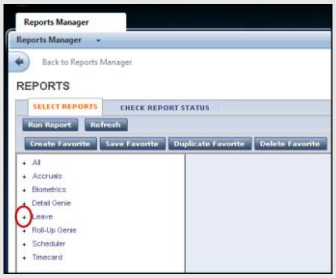
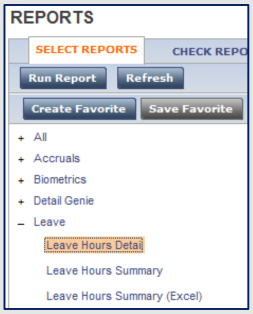
Generating Leave Reports

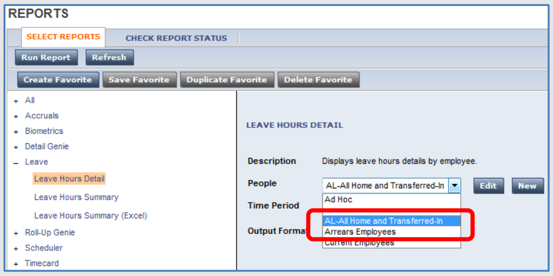
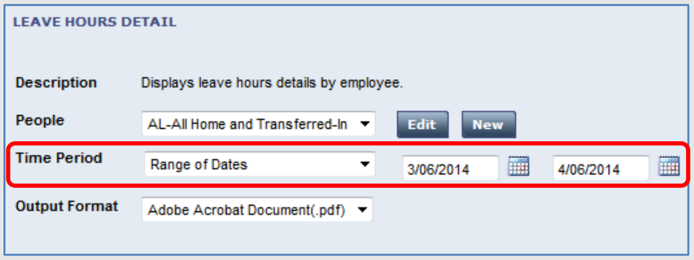
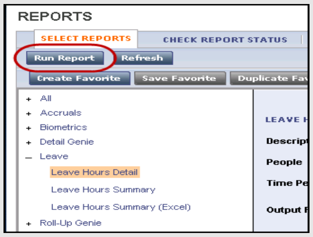
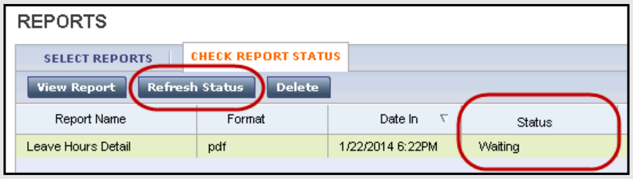
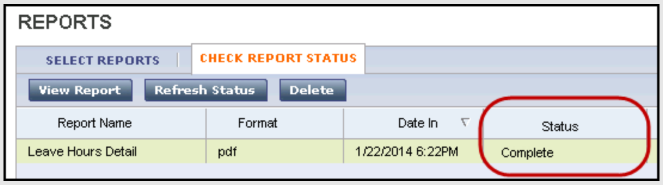
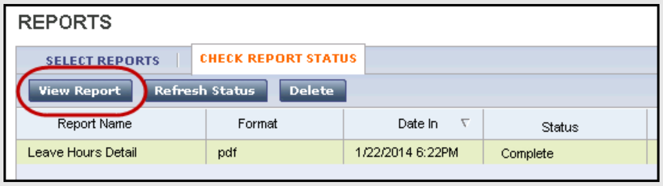
Purpose

Employee leave information is available in several different leave reports. You can generate leave reports on a daily, weekly, or pay-period basis, or any time you need information to accomplish your business tasks. For example, you can generate the Leave Hours Detail report to review the types of leave hours for each shift that has been committed to an employee's timecard.

Exercise

You want to review the **leave hours** for each employee. Generate the **Leave Hours Detail** report to view this information.

Steps		
1	In the **Related Items** pane, click the **arrow** to expand the pane, and select **Reports Manager**.	 Manage My Requests My Inbox My Views Pay Period Close QuickFind Reconcile Timecard Reports Manager
2	On the Select Report tab, click the plus sign (+) next to Leave to expand the category.	 Reports Manager Reports Manager Back to Reports Manager REPORTS SELECT REPORTS CHECK REPORT STATUS Run Report Refresh Create Favorite Save Favorite Duplicate Favorite Delete Favorite + All + Accruals + Biometrics + Detail Genie + Leave + Roll-Up Genie + Scheduler + Timecard
3	Select **Leave Hours Detail** report.	 REPORTS SELECT REPORTS CHECK REPO Run Report Refresh Create Favorite Save Favorite + All + Accruals + Biometrics + Detail Genie – Leave Leave Hours Detail Leave Hours Summary Leave Hours Summary (Excel)

Steps		
4	From the **People** drop-down list, select **All Home and Transferred In**.	 **Description** Displays leave hours details by employee. **People** AL-All Home and Transferred-In REPORTS SELECT REPORTS CHECK REPORT STATUS Run Report Refresh Create Favorite Save Favorite Duplicate Favorite Delete Favorite All Accruals Biometrics Detail Genie Leave Leave Hours Detail Leave Hours Summary Leave Hours Summary (Excel) Roll-Up Genie Scheduler Timecard LEAVE HOURS DETAIL Time Period Output Forma Edit New Ad Hoc AL-All Home and Transferred-In Arrears Employees Current Employees
5	From the **Time Period** drop-down list, select a relative time period, or select **Range of Dates** and enter the date ranges you want to view. For this exercise, select **Range of Dates** and enter a **30-day time span**, using **today's date** for the start date.	 LEAVE HOURS DETAIL **Description** Displays leave hours details by employee. **People** AL-All Home and Transferred-In **Time Period** Range of Dates 3/06/2014 4/06/2014 **Output Format** Adobe Acrobat Document(.pdf)
6	Click **Run Report**.	 REPORTS SELECT REPORTS CHECK REPORT STATUS Run Report Refresh Create Favorite Save Favorite All Accruals Biometrics Detail Genie Leave Leave Hours Detail Leave Hours Summary Leave Hours Summary (Excel) Roll-Up Genie
7	You are redirected to the **Check Report Status** tab. Review information in the **Status** column. Click **Refresh Status**. Wait until **Complete** displays in the **Status** column.	 Report Name: Leave Hours Detail; Format: pdf; Date In: 1/22/2014 6:22PM; Status: Waiting REPORTS SELECT REPORTS CHECK REPORT STATUS View Report Refresh Status Delete  Report Name: Leave Hours Detail; Format: pdf; Date In: 1/22/2014 6:22PM; Status: Complete REPORTS SELECT REPORTS CHECK REPORT STATUS View Report Refresh Status Delete
8	To view the report, click the report name and select **View Report**. (Sample leave reports display in the following section.)	 Report Name: Leave Hours Detail; Format: pdf; Date In: 1/22/2014 6:22PM; Status: Complete REPORTS SELECT REPORTS CHECK REPORT STATUS View Report Refresh Status Delete
9	(Optional) To print the report to a local printer, select the **Print** button from the menu that displays on the report.	

Sample Leave Reports

Leave Hours Detail

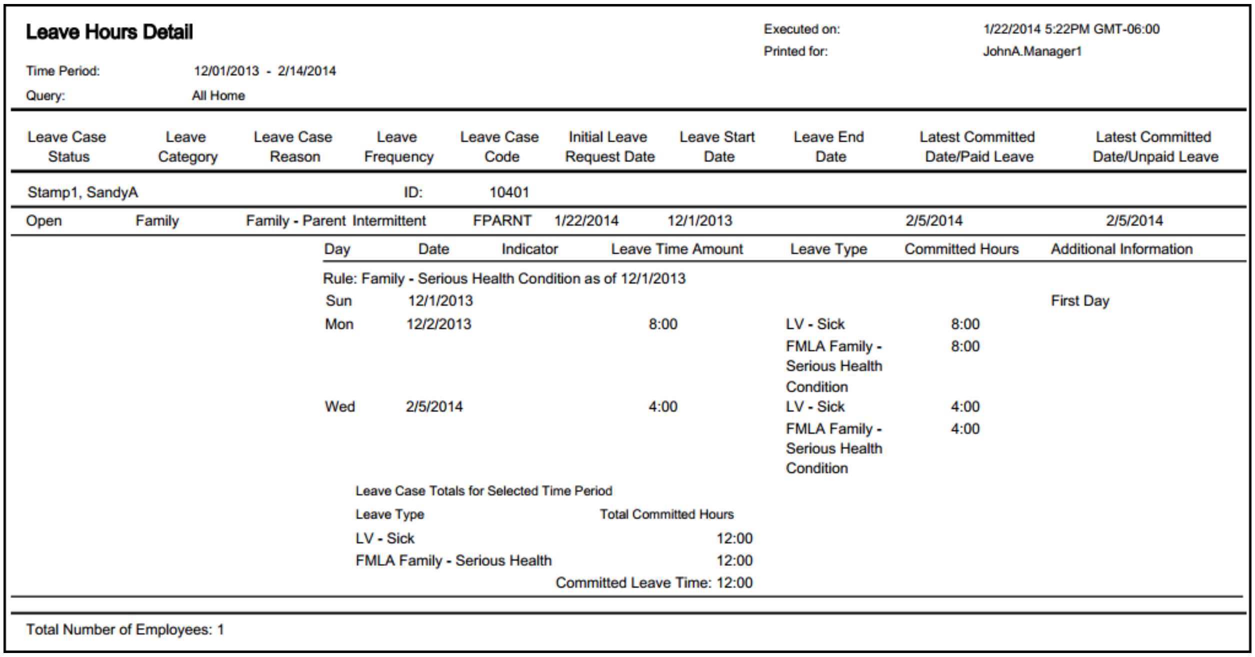
The **Leave Hours Detail** report lists detailed leave information for employees with open or closed leave cases for the requested time period.

Use the **Leave Hours Detail** report when you want to view leave information included in the Leave Cases View and the Leave Hours View, in one convenient report.

The report is sorted alphabetically by employee and includes (but is not limited to):

- Leave Case Status
- Leave Type
- Leave Type Amount
- Leave Category
- Leave Reason
- Committed Hours
- Additional Information

The following illustration is an example of the **Leave Hours Detail** report.



Leave Hours Detail

Executed on: 1/22/2014 5:22PM GMT-06:00
Printed for: JohnA.Manager1
Time Period: 12/01/2013 - 2/14/2014
Query: All Home

Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Latest Committed Date/Paid Leave	Latest Committed Date/Unpaid Leave
Stamp1, SandyA			ID:	10401					
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		2/5/2014	2/5/2014

Rule: Family - Serious Health Condition as of 12/1/2013

Day	Date	Indicator	Leave Time Amount	Leave Type	Committed Hours	Additional Information
Sun	12/1/2013					First Day
Mon	12/2/2013		8:00	LV - Sick	8:00	
				FMLA Family - Serious Health Condition	8:00	
Wed	2/5/2014		4:00	LV - Sick	4:00	
				FMLA Family - Serious Health Condition	4:00	

Leave Case Totals for Selected Time Period

Leave Type	Total Committed Hours
LV - Sick	12:00
FMLA Family - Serious Health	12:00

Committed Leave Time: 12:00

Total Number of Employees: 1

Leave Hours Summary

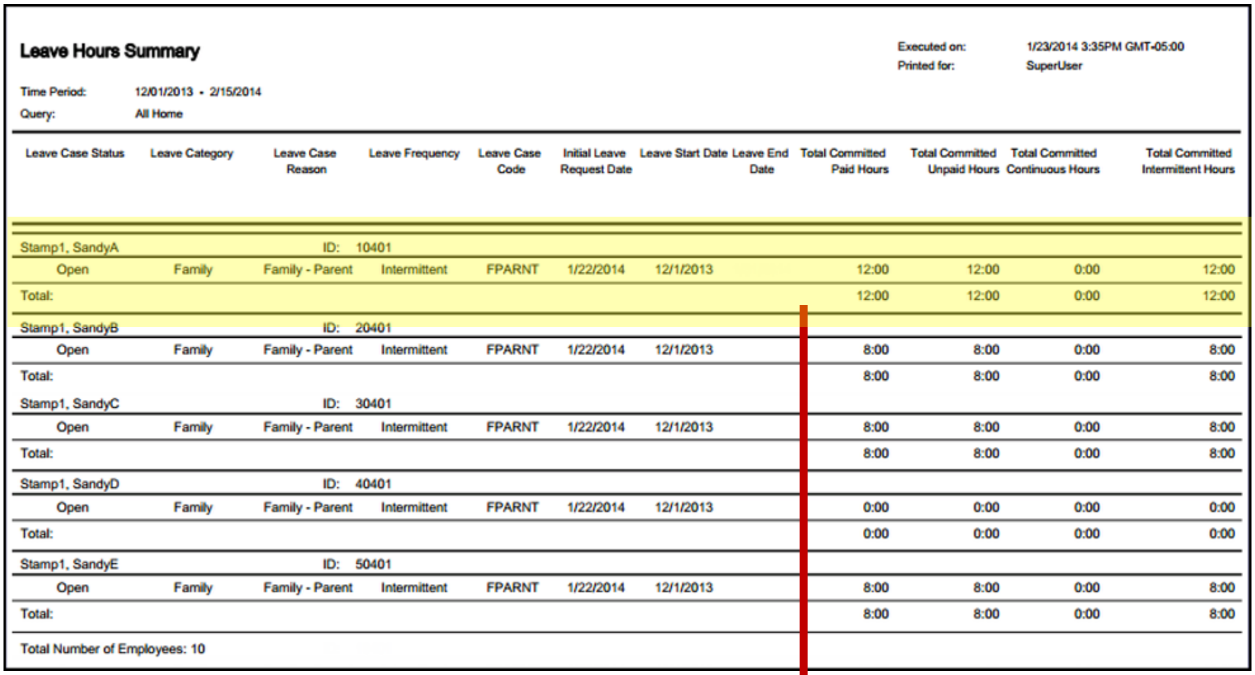
The **Leave Hours Summary** report lists, for each employee, all open or closed leave cases in the requested time period, as well as any requested leave cases in the requested time period.

Use the **Leave Hours Summary** report to itemize and record total committed hours in a specified time period.

The report is sorted alphabetically by employee and includes (but is not limited to):

- Leave Case Status
- Leave Category
- Leave Reason
- Total Committed Continuous Hours
- Total Committed Intermittent Hours

The following illustration is an example of the **Leave Hours Summary** report.



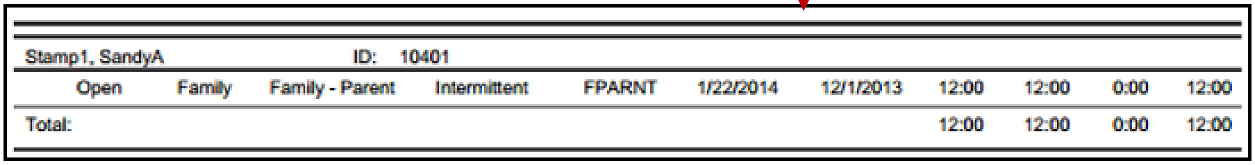
Leave Hours Summary

Executed on: 1/23/2014 3:35PM GMT-05:00
Printed for: SuperUser

Time Period: 12/01/2013 - 2/15/2014
Query: All Home

Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Total Committed Paid Hours	Total Committed Unpaid Hours	Total Committed Continuous Hours	Total Committed Intermittent Hours
Stamp1, SandyA		ID: 10401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		12:00	12:00	0:00	12:00
Total:								12:00	12:00	0:00	12:00
Stamp1, SandyB		ID: 20401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Total:								8:00	8:00	0:00	8:00
Stamp1, SandyC		ID: 30401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Total:								8:00	8:00	0:00	8:00
Stamp1, SandyD		ID: 40401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		0:00	0:00	0:00	0:00
Total:								0:00	0:00	0:00	0:00
Stamp1, SandyE		ID: 50401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Total:								8:00	8:00	0:00	8:00

Total Number of Employees: 10



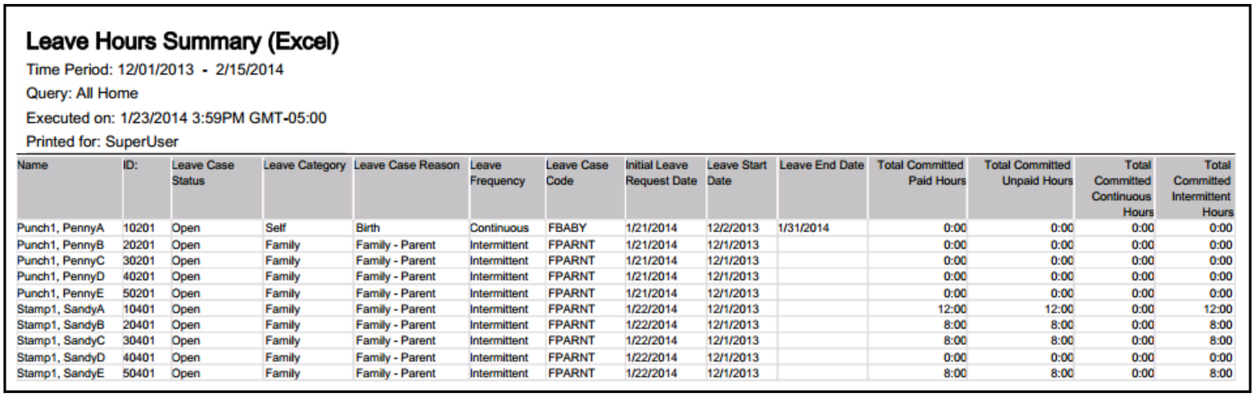
Stamp1, SandyA		ID: 10401								
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	12:00	12:00	0:00	12:00
Total:							12:00	12:00	0:00	12:00

Leave Hours Summary (Excel)

The options and report content in the **Leave Hours Summary (Excel)** report are the same as the Leave Hours Summary report.

Use the **Leave Hours Summary (Excel)** report if you plan to export the results to Excel for further sorting and analysis.

The following illustration is an example of the **Leave Hours Summary (Excel)** report.



Leave Hours Summary (Excel)

Time Period: 12/01/2013 - 2/15/2014

Query: All Home

Executed on: 1/23/2014 3:59PM GMT-05:00

Printed for: SuperUser

Name	ID:	Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Total Committed Paid Hours	Total Committed Unpaid Hours	Total Committed Continuous Hours	Total Committed Intermittent Hours
Punch1, PennyA	10201	Open	Self	Birth	Continuous	FBABY	1/21/2014	12/2/2013	1/31/2014	0:00	0:00	0:00	0:00
Punch1, PennyB	20201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyC	30201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyD	40201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyE	50201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Stamp1, SandyA	10401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		12:00	12:00	0:00	12:00
Stamp1, SandyB	20401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Stamp1, SandyC	30401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Stamp1, SandyD	40401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		0:00	0:00	0:00	0:00
Stamp1, SandyE	50401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00

Notes